

WISCONSIN WORKS (W-2) CONTRACT AND IMPLEMENTATION COMMITTEE

131 W. Wilson Street, Room B139
Madison, WI 53707

Friday, April 16, 1999
10:00 AM - 2:00 PM

AMENDED MINUTES

The W-2 Contract and Implementation Committee is the single point of contact for feedback to the Department of Workforce Development on policy implementation related to W-2 agencies, and includes representation from the Wisconsin County Human Service Association (WCHSA), Urban Caucus counties, W-2 private agencies in Milwaukee County and the balance of state, and Tribal W-2 agencies.

Committee

Attendees: Jean Rogers, Chair; Phyllis Bermingham, Marathon Co. Employment and Training; Mary Ann Cook, Dane Co. Dept. of Human Services; Rosa Dominguez (alternate), Opportunities Industrialization Center of Greater Milwaukee (OIC-GM); Mona Garland, MAXIMUS; Chris Schmitz (alternate), Fond du Lac Co. Dept. of Social Services; Deb Hughes (alternate), Southwest Consortium; Cleshette Nash (alternate), YW-Works; Tina Koehn, United Migrant Opportunity Services (UMOS); Jim Krivsky (alternate), Racine Co. Human Services Dept.; Barbara Metoxen, Oneida Tribe; Jeff McCabe (alternate), Employment Solutions; Jim Nitz (alternate), Kaiser Group; Shirley Ross, La Crosse Dept. of Human Services; Michael Van Dyke, Door Co. Dept. of Social Services; Ed Kamin (alternate), Kenosha Co. Division of Workforce Development

State Staff

Attendees: Bev Belany, BEPO; Shari Busse, BWI; Tim Hineline, BWI; Sue Larsen, BWI; Christina Martin, BEPO; Germaine Mayhew, DES Training Section; Margaret McMahon, BWI; Karen Messinger, BEPO; Jude Morse, BMO; Shawn Smith, BWI; Jan Van Vleck, Special Assistant, Alice Wilkins, BWI; Rick Zynda, BWI

Absent: None

Guests: Marcia Christianson, Forward Service Corporation; Kelly Grant, Central Wisconsin Community Action Council; Bob Macaux, Florence Co. Human Services Dept.; Sharon McCormick, Sheboygan Co. Dept. of Health and Human Services; Teresa Pierce, Western Wisconsin Private Industry Council (PIC); Marilyn Putz, Walworth County, Kaiser Group; Gary Rudzianis, Curtis & Associates; John Schere, Opportunities Industrialization Center of Greater Milwaukee (OIC-GM); Kim Walia, Clark Co. Dept. of Social Services

Recorder: Shari Busse, W-2 Contract and Implementation Committee Coordinator

(NOTE: Jim Krivsky requested an edit regarding his suggestion under the TANF Update. This edit is indicated by underlining the new language.)

Welcome

Jean Rogers opened the meeting by introducing Shari Busse, W-2 Program and Planning Analyst. Shari has replaced Sue Larsen as the Coordinator for the committee. Sue has departed DWD and accepted a position with the Dept. of Health and Family Services. The committee would like to thank Sue for her service and wish her the best of luck in her new position.

Jean addressed some requested additions to the agenda. Bob Macaux was present to request activation of the Contract Dispute Resolution process. The committee developed a sub-committee to be chaired by George Leutermann, which reviews such requests and makes a recommendation to the full committee. The full committee's recommendation goes to Department legal counsel.

Michael Van Dyke requested RFP issues be added to the agenda to provide an opportunity to discuss concerns of the counties regarding the proposal and its content.

March 1999 Minute Approval

Shirley Ross noted the discussion of the definition of a W-2 case was not in the minutes. Jude proposed language to be included at the end of the minutes. The committee agreed to the proposed addition. Michael Van Dyke noted the motion

made under Minimum Performance Standards carried unanimously. Deb Hughes noted a correction from the W-2 Southwest Consortium to Grant County under Community Steering Committees. A motion was made to approve the amended March 19, 1999 minutes, motion carried.

Issue/Discussion: TANF Update, Shawn Smith, DES/BWI

Jean Rogers stated the final TANF rule was published Monday, 4-12-99. The federal government listened to many of the States recommendations regarding what is allowable, penalties, kinds of reporting and how states spend funding. The new regulations will take time to implement.

Shawn Smith indicated that she had been prepared to go into detail about the definition of assistance under the proposed rules. However, since the final rules have been published, she shared page 2 of the Executive Summary which states the definition includes payments directed at ongoing, basic needs – even when individuals are participating in community service and work experience as a condition of receiving payments that address their basic needs.

It excludes non-recurrent, short-term benefits designed to deal with individual crisis situations rather than ongoing need. These benefits cannot provide for needs that will extend beyond 4 months. The definition also excludes child care, transportation and supports provided to employed families (no definition of ‘employed families’), Individual Development Account (IDA) benefits, refundable earned income tax credits, work subsidies to employers, and services such as education and training, case management, job search, and counseling. This revised definition of assistance will make it easier for States to use welfare block grant dollars to help people who have left welfare stay off the rolls – or to help families so they do not have to go on welfare in the first place.

The rule also defines Welfare-to-Work (WtW) cash assistance as assistance that addresses basic needs and that can be legally converted to cash. Therefore, cash assistance ticks the clock but other benefits do not.

A preliminary assessment of the final rule indicates that this definition may have the following effects:

- Community Reinvestment – agencies will not have to submit the detailed report for large numbers of people and only a limited number of participant’s clocks will be effected. Ed Kamin asked for clarification on how this effects CR. Agencies will still be responsible for verifying TANF eligibility, completing the short form and making entries in CARES but the long form will be required for far fewer people.
- Trial Jobs – there is a possibility that this placement may not tick a person’s clock.
- Job Retention services – agencies will have greater flexibility in providing these services to employed families.
- Transportation – Operations memo 99-18 described tracking of transportation funds. Tracking would no longer be necessary for employed families so this policy will be clarified.

The TANF final rule is posted to the Federal Register on the Department of Health and Human Services, Administration for Children and Families web site at <http://www.acf.dhhs.gov/news/welfare/>.

Community Reinvestment Update background paper was distributed as a recap of the information shared at the March meeting. Jim Krivsky referenced the fact that non-assistance services include job-search activities. He stated that they may have 3,000-4,000 people utilizing this service in a week and a larger allocation would be necessary to accommodate taking applications for this group. He suggested using a survey to measure customer usage. A second option he suggested was a screen on JobNet could capture the application information. Several committee members supported that suggestion. Any modifications to JobNet would require consultation with DWE.

In summary, Jean Rogers stated that for those who are receiving assistance there are more data elements required and the application form will be modified to capture this information. The final TANF regulations are effective October 1999.

Issue/Discussion: Minimum Performance Standards – Edits and Discussion, Jean Rogers

Jean Rogers issued an apology to the committee for the inclusion of Minimum Performance Standards on last month’s agenda without providing background for this issue. The Department clearly recognizes that agencies have their own customer service performance standards or work rules and that these standards differ between agency and county. Concerns regarding customer service expressed in Milwaukee are not limited to Milwaukee, nor are they limited to W-2. There is a need for a more formalized structure to deal with customer service issues. The draft administrator’s memo was provided as a basis for discussion for three reasons:

- There is a need for a basis to demonstrate that customer relations have a formal focus from a public perspective.
- There is a need to demonstrate coordination, commonality and cooperative relationships for customer service issues.
- There is a need for a tool for local agencies to refer to in developing a cooperative customer service package.

The timing of this issue stems from the need to have a tool in place as the Department goes in to the Legislative process.

A discussion of the Minimum Performance Standards draft administrator's memo took place at the IMAC meeting. The general consensus of this group was the administrator's memo should deal clearly with the policy issue, informing agencies of the broad categories required but not addressing how to individually address each. Jean stated the memo should be a policy piece, which formalizes existing standards. Agencies would be required to provide assurances that the items are on file and could be provided if requested.

Michael Van Dyke commented that was an accurate representation of the IMAC discussion. He questioned whether the Division has these categories of standards in place. The Department and the Division do have work rules. The suggestion was made that the Division follow the same process as is expected of the agencies. In addition, he stated that focus is often on the negative. The document should begin by acknowledging the fact that many areas have standards in place. Ed Kamin asked if the goal is to provide quality customer service. He feels the customer needs should dictate quality and generic performance standards can sometimes be adverse, citing the child care performance standards as an example. He supports having Area Administrators review problems in this area and having regional offices work with areas to improve. Several committee members expressed concern over the original draft.

Jean Rogers indicated that various agencies involved with a client have different levels of customer service. For example, customer service equality between W-2 agencies and Child Support agencies is likely to become a bigger issue as the emphasis on child support rises and new enforcement tools are implemented. Public and private partnerships are expected to meet a common standard. The goal of the Minimum Performance Standards is to make it clear to our clients, the public and ourselves that customer service issues are addressed. Quality customer service is an expectation of agencies. The Department will draft a set of guiding principles to be reviewed by the committee. Mary Ann Cook will collect responses.

Issue/Discussion: Workforce Investment Act Update, Pam O'Brien, DWE

The Workforce Investment Act (WIA) replaces JTPA with a new program with similar targeted populations such as adults, youth and dislocated workers, a similar administrative structure, but with a program design intended to be more cost effective and which better meets employer and job seeker needs. It also provides the employment and training services of a variety of federal training programs in a one-stop environment in each of workforce development area of the state and encourages states to do unified planning among these various federal employment and training programs.

WIA in Wisconsin timeline:

- In mid-April release of draft preliminary WIA allocations for July 1, 2000.
- By the end of April development of detailed task assignments to allow completion of overall plan by March 31, 2000, the due date for the July 1, 2000 WIA plan.
- By early May 1999 instructions to Local Elected Officials and local PICs, including those called Workforce Development Boards, on their roles and responsibilities.
- In the next month or two appointment of a new Governor's Council on Workforce Investment.
- September 1, 1999 - local Workforce Investment Boards appointed.
- November 1, 1999 - release of WIA Local Plan Guidelines.
- April 1, 1999 - local plans approved, Youth Programs begin and State WIA plan submitted.
- July 1, 2000 - WIA Program begins and JTPA ends except for carryover funds.

Leonor Rosas DeLeon, Dianne Reynolds and Shawn Smith are the DES contacts for WIA issues. Alice Wilkins will be replacing Ann Agnew on the WIA Interdivisional Coordinating Team.

Tina Koehn asked where the Community Steering Committee fits. This is a key area for discussion. Mary Ann Cook questioned what TANF means for inclusion in WIA. This question has not been answered. The individual issue groups will be involving local areas too clarify these issues and others.

Kelly Grant questioned the inclusion of Community Service Block Grant (CSPG) programs and what role CSPG plays in WIA. CSPG participation is required under the federal statute and the CSPG coordinator is meeting with the group to define its role. Phyllis Birmingham asked when the governor would decide if the administrative agency can run programs. Deb Hughes stated this is of major concern of PICs that become Workforce Development Boards who will be unable to run programs.

Issue/Discussion: W-2 Agency Contract Dispute Resolution Sub-Committee Report, Mona Garland, chair

The Contract Dispute Resolution Sub-Committee met over the break to review the Department's Right of First Selection decision made in reference to Florence County. Mona Garland chaired the sub-committee in George Leutermann's absence and reported their findings to the full committee. The sub-committee voted unanimously to uphold the Department's decision and stated no information was presented which made them disagree with the decision. Copies of the letter from Florence County requesting this review and of the sub-committee process were distributed to the full

committee. Jean Rogers indicated this is a step in the process. The recommendation of the committee goes to Department Legal Counsel.

Bob Macaux stated that the sub-committee asked him several questions about the case, which he felt were not relevant. He felt the relevant issue is the benchmark used for smaller agencies. Jim Nitz stated the committee was given the criteria to evaluate this particular decision, not to evaluate the whole process. Deb Hughes indicated she felt there were many flaws in the process. Michael Van Dyke spoke on behalf of small counties that directions, examples and procedures focus on larger agencies. He stated differences between large and small agencies need to be acknowledged. Jean Rogers indicated that the ability to address these issues has been built into the new draft RFP including Right of First Selection criteria. The Department is interested in looking for additional ways to make the process fair.

A motion was made to accept the sub-committee's recommendation by Jim Nitz, seconded by Rosa Dominguez. Motion carried, two opposed.

A motion was made to encourage the Division to make right within its power this decision for Florence County since some counties are held to the standards and others not because perfection is a very different standard by Phyllis Bermingham, second by Michael Van Dyke. Motion carried unanimously.

Jean Rogers encouraged the committee to review the RFP for issues regarding large and small agencies. Small agency issues will be included on a future committee meeting agenda.

Issue/Discussion: RFP Issues, Jean Rogers

Jean Rogers listed a variety of issues addressed in the RFP to include: small and large agencies, outcome driven performance standards, case definition and earning bonuses. Shirley Ross questioned the format of the document. DES largely created the first document and this document was created Department wide with broad-based consensus that the plan be specifically defined.

Michael Van Dyke commented this was his first opportunity to view the RFP and requested the deadline for comments be extended two weeks in order to understand the differences in the RFP and current contracts and to make useful suggestions. To assist agencies with the comparison, a crosswalk document between current contracts and the RFP will be prepared when the RFP is finalized.

Committee members voiced a variety of concerns with the draft RFP document. In regard to performance standards related to entered employment placement rate, wage rate and retention rate, it was felt that agencies who succeeded in getting employable people employed under the first contract are being penalized. Agencies are working with a very difficult group to serve. Phyllis Bermingham referenced the case descriptions shared at last month's meeting and indicated that performance standards should be tied to the characteristics of these people. Tina Koehn indicated she would prefer the separation of FSET from W-2. Jim Nitz questioned the fact that an agency must meet the base benchmark in all categories to be eligible for any bonus. He suggested that performance be tied to that base alone, four out of seven or some other similar standard. Michael Van Dyke suggested including BadgerCare as the health program for those going into employment without health insurance.

The issue was also discussed regarding the allocation for BadgerCare and Food Stamps. Concern was expressed that neither the W-2 nor the IM allocations have enough funding. W-2 is successful in getting people to work but most are still receiving Medicaid and Food Stamps. Ed Kamin indicated that the Kenosha caseload has not declined; it has shifted. It was suggested that a W-2 case be defined as any case with a dependent child falling within a certain income range. Mary Ann Cook questioned which are economic support and which are work programs. In addition, how would this definition be related to funding? She stated that a decline in W-2 does not reflect a decline in caseload – if others are included as a W-2 case then increase the W-2 allocation, if not a W-2 case, increase the IM allocation. If a W-2 case is defined narrowly, then the working poor are IM cases. Jean Rogers indicated all of these issues will receive consideration.

Jude Morse provided an explanation of how levels are set. IM contract levels and W-2 contract levels are calculated on an aggregate basis. These two totals equal the total cost to continue and are a set amount. Michael Van Dyke questioned what the assumptions were and how funding was arrived at. Jude indicated Appendix C answers these questions.

A motion was made to extend the review and comment period to April 30, 1999 by Phyllis Bermingham, seconded by Michael Van Dyke. Motion carried. The updated timetable will be posted on the Internet.

Issue/Discussion: Y2K Compliance, Nancy Buckwalter, Data Systems Administrator

The first of three administrator's memos regarding Year 2000 Readiness was shared in draft form. This first memo notifies agencies of the need to be compliant and does not require a response. A second memo will provide detail for a contingency plan with a checklist to meet the minimum requirements.

Issue/Discussion: Monthly CARES Update Report, Tim Hinline, DES/BWI

See attached report. Tim Hinline indicated that a date for BadgerCare would be available next week. Internet CATS is experiencing response time problems. The Department is working with the vendor to correct these problems prior to rollout. Tim provided an explanation of the difference between a static terminal connection where the CARES session stays up until logged off and a dynamic connection where the session is terminated after 30 minutes of inactivity. Failing to log off a static terminal causes data integrity problems and is a security violation. Workers must be reminded it is imperative to log off when not using the system.

Issue/Discussion: Training Section Update, Germaine Mayhew, DES Training Section

DES Training Section staff are in the process of delivering the curriculum for Medicaid Management Information System (MMIS) Training. Development of curriculum for BadgerCare training is on schedule with a delivery date of June 7, 1999. Food Stamp Special Topics training continued statewide through the month of March. Enhanced Case Management and Food Stamp Error Reduction training continues on a statewide basis. Presentation of Case Management Strategies began March 1999 and will be held in all regions of the state. Review and updating of New Worker training continues. Development of the curriculum for Child Care Certification has been completed and statewide training will begin in April. Curriculum staff is in the development stage of CARES Basics for Child Support Workers.

Issue/Discussion: Brookings Study of Welfare Caseloads in America, Jean Rogers

Welfare caseloads concentrations in selected urban areas were issued from a study released by the Brookings Institution's Center on Urban & Metropolitan Policy. According to this study, Milwaukee County shows an increase from 56.6 percent of the state's total caseload in 1994 to 85.9 percent in 1998. Additional information may be viewed at <http://www.cnn.com/US/9902/18/AM-Cities-Welfare-List.ap/>.

Issue/Discussion: 24-Month Time Limits Update, Margaret McMahon, DES/BWI

BWI Operations Memo 99-21 issued 3-19-99 communicated clarifications to the W-2 time limit policies and modifications to CARES programming as it relates to these policies. Margaret McMahon distributed copies of the February and March versions of the Community Service Jobs 24-Month Clocks EOS report (Form Name: CT06) and the W-2 Transition report (CT05). Due to the data cleanup described in OPs memo 99-21, there may be significant change between February and March. Agencies should be sure to review the reports and be aware of the change.

The Department has approved its first extension of the 24-month limit for a case in Fond du Lac (FDL) County. Margaret introduced Chris Schmitz from FDL who spoke briefly about the W-2 agency's experience with the extension review process. Chris indicated they were frustrated with the beginning of the process with only a draft of the administrator's memo to work from but they received excellent technical assistance from their regional office and made a special point of thanking Kevin Huggins for his assistance. Margaret began with an explanation of the internal review process and what could be improved. The process began by convening a group of DES staff to review the application. The internal review team consisted of the DES W-2 contract manager, a Bureau of Employment Programs Operations staff member and a W-2 policy analyst. Because this case was a Hmong family, two Refugee staff members were also asked to participate in the review. After an initial meeting of the review team, the Area Administrator was asked to facilitate getting additional information necessary for making a decision on the application including a one-page summary of the case and answers to some specific questions. The review team reconvened with the additional information and recommended approval of the extension, which was upheld by the Division Administrator. Additionally, through their discussions, the review team developed action steps it felt the agency should consider during the extension process.

The process can be streamlined by clarifying the application instructions and revising the application to include the additional information requested, such as the one-page case summary. The sense of urgency that time limits create was reiterated through this process. When the husband's doctor in this case was confronted with the time limit, he agreed the husband could attend adult daycare. In addition, it reinforces the necessity for the community, the agency and the Division to seek alternatives. Early intervention is critical. Administrator's Memo 99-04 details some early intervention steps. The Division will work with the Area Administrators to identify cases nearing the end of their time limits so AAs can contact agencies to provide technical support. A review of W-2 T cases at 19 months revealed no documentation of discussions with the participant regarding time limits. Workers should ensure that they are discussing the issue of time limits with their participants and they must document these discussions. Also, agencies can look at those CSJ cases approaching 24-months and reassess the participant. The fact that the participant has been in a CSJ for close to 24 months may indicate that the participant has more severe barriers that make them incapable of participating in a CSJ.

This was a learning experience for all involved and the timeliness of the agency's submissions to the department was greatly appreciated. Margaret made a specific point of thanking Fond du Lac for sharing their experiences with the group.

Margaret also distributed a TANF 60-Month Time Limit one-pager meant to provide some knowledge regarding the 60-month time limit provision provided for in the TANF law. If you have questions or comments, please call Margaret in the Bureau of Welfare Initiatives at 608-266-5899.

- In general, States may not use the TANF funds to provide assistance to a family if it includes an adult or minor head of household or the spouse of the head of household who has received assistance for a cumulative total of more than 60-months.
- States have the option to extend assistance beyond the five-year limit for federally funded assistance for a maximum of 20 percent of their average monthly cases. In Wisconsin, the first time anyone could reach the 60-month time limit is October 2001. At that time, the 20 percent determination will be based on the state's choice of the current fiscal year or the previous fiscal year, whichever works to our advantage.
- If the state does opt to extend assistance, it may apply the extension to a particular family only once an adult in the family has received 60 cumulative months of assistance.
- Months in which a family receives cash assistance funded with Welfare-to-Work (WtW) monies count toward the five-year limit; months in which a family receives only noncash assistance under WtW do not count towards the five-year limit.

NEXT MEETING DATE:

May 21, 1999

101 S. Webster Street

GEF 2, Room 27

Madison, WI 53707

RECENT AND UPCOMING CARES CHANGES OVERVIEW

Issued April 16, 1999

Major Initiatives: Completed or in Progress	DATE	BACKGROUND
Clocks	4/99	The next portion of clocks to be implemented are clock notices at 20 and 23 months of job clocks. Also logic will be added for job clock extensions. These changes will be implemented during April and May. Agency will be notified when the changes are implemented.
Driver Flow Fixes	4/99	The problem of workers getting stuck on screen ABWD, generally when doing a review, has been fixed. However, many existing cases will still get stuck at the next review. Once they are cleared by the help desk, they will not get stuck on that screen again. Work continues on resolving the problem of getting stuck on clearance screens when a W-2 review (ASCO) is initiated.
MA Swipe cards	6/99	This project has been delayed to ensure that Pharmacies are properly connected to the EDS Claim System. Clients in the pilot counties will receive their "Forward " cards sometime in late August (possibly late July). Clients in the rest of the state will receive their cards at least two months after the pilot. The cards will be valid for use upon receipt.
BadgerCare	7/1/99	Although BadgerCare will be effective on 7/1/99, it will be implemented in CARES beginning mid to late July. Implementation will continue over 2 to 3 months.
Food Stamp EBT	10/1/99	Several meetings have been held with the EBT vendor. State staff are in the Joint Application Design process at the present time. A construction and testing plan is being finalized. A pilot county is scheduled to begin operation in 10/99 with full roll out beginning after January 2000.
Major Fatals	ongoing	EDBC fatal having performing paragraph 830AO-CRE-WW-BUD, which was again began to occur about three weeks ago, was fixed this past Monday, 4/121/99. Numerous other smaller fatals and abends are scheduled to be fixed on 4/23/99. Research continues on fatals that occur when there are a large number of unconfirmed rows on AGECE. Also, work is continuing to reduce the overall number of fatals and abends.
Client Registration – Clearance	No date set	We are researching the various causes of duplicate PINs and exploring solutions to reduce their occurrence. We are also researching the best method of resolving duplicate PINs when they do occur.
Community Reinvestment	On-Hold	DES is reviewing options. A meeting will be held with R&S to determine federal reporting requirements. Once an option and reporting requirements are determined, Deloitte Consulting will be asked for an estimate to implement in CARES.
Pro-Rated/Wage Paying CSJs	On-Hold	The automation of the pro-rated and wage paying CSJs is postponed until after Badger Care.
Major initiatives: In Planning/Development		
SSA State On-Line Query (SOLQ)	4/99	SSA has expanded the pilot phase of the SOLQ to include Wisconsin. The necessary query screen and audit trail are being programmed in CARES. A couple of volunteer county agencies are needed for the initial pilot.
Simulation for Benefit Recovery		The "core" group for simulation/benefit recovery has been formed and has met twice. It is planning agency visits and is research many of the issues that have already been raised. Another meeting of state and agency staff is scheduled for 4/28/99.